

ILS CONSORTIA IN WISCONSIN: A SNAPSHOT OF THE LANDSCAPE, 2014

Earlier this year, the DPI contracted with WiLS to study and report on the current state of shared Integrated Library Systems (ILS) operated by Wisconsin's Public Library Systems. The report would provide an update to a previous effort from September 1996. In this case, the consultant was asked to collect information from each ILS consortia and to develop cost and operational comparisons that will be valuable when considering larger units of service for systems and ILSs in the state. The report would also identify the remaining larger stand-alone libraries and counties in the state and determine their reasons for non-participation in the consortia.

One of the difficulties in this type of process is gathering comparable data -- comparing "apples to apples". The survey was designed in a granular way to mitigate that issue. This level of specificity meant a lengthy survey, and the DPI is grateful for the time and resources the System personnel devoted to working with WiLS throughout the process.

Once the survey results were compiled, WiLS reviewed and discussed the results with each group to make sure that the data is comparable and accurate. Despite the efforts to solicit comparable data from the systems, the results still required considerable follow-up and resulted in a report that afforded some comparables, but also pointed out the need to establish more consistent measures, financial reporting, and terminology among the various ILS systems.

The full study report, at 243 pages, is available here: http://pld.dpi.wi.gov/files/pld/pdf/WiLS_ILS_study_final.pdf
The results indicate some patterns that point to possible changes.

Overview:

While the study was primarily designed to collect and standardize data from the ILS consortia, it revealed some facts about the ILS consortia in Wisconsin:

1. *Most of the consortia in the state are using one of the two products from Innovative Interfaces, Inc.:* See map on page 13 for details about which consortia are using which vendor.
2. *There is very little consistency among the consortia:* As independent entities, the consortia have developed different ways of working over time, including:
 - Governance, including governing bodies (see page 42 for an illustration), participation agreements, bylaws, etc.
 - Budgeting, including what costs are included in the ILS budget, how the budget is presented, and dividing costs among members (see pages 71-75 as an example).
 - Services: Different consortia provide different services for their members. Page 76 shows the brief list of services provided by all consortia; pages 92-176 show the details of services provided by each consortium. The practices for bibliographic services, a critical component of an ILS service, are summarized on page 86.
 - Staffing: The levels of staffing to support the ILS consortia vary, with most consortia having 2.1-3 people providing ILS-related services (see page 79 for more information).
3. *The consortia have budgeted \$7.2 million in their ILS budgets for 2014, with \$5 million contributed by participating libraries:* Because of the lack of consistency in what is included in the ILS budget, some of the budgets include services not considered "ILS" for the purposes of the study (see page 67 for a budget summary and details of these services). Others do not include services and personnel considered "ILS" for the purposes of the study (see pages 92-176 for details about what services are included in each consortium's budget).
4. *While the libraries contribute the majority of the funds to support the consortia, there are no mechanisms in place to measure satisfaction with the ILS consortia services in a consistent way.*

In addition to collecting and standardizing data, the study did ask current ILS consortia staff about their perceptions of larger units of service for ILS services. Respondents generally felt that some of the proposed advantages would have benefit for libraries and patrons, but did not feel as confident that these benefits would occur with larger units of service (see page 190-192 for details). One respondent explained that these advantages would not be equal among the consortia because of the inconsistency of resources and services.

The respondents were also asked to rank some pre-identified challenges to larger units of service and to add some of their own (see page 193). Not having enough staff to provide high quality service, communication issues, and changes in delivery service ranked highest on the list. However, some of the other high-ranked challenges (consistency of policies and enforcement, additional standardization required, change in governance model, etc.) reflect the differences among the consortia as described above.

Given the current environment, it will be difficult to create larger units of services from existing ILS consortia without first working toward more consistency, including a more consistent understanding of satisfaction with the ILS consortia as they exist today. That being said, there are a few areas where centralization may be more likely to be successful. Below are four categories of recommendations to move toward more consistency and centralization:

Best practices & templates

- *Selection and procurement of ILS platform.* Develop best practices for processes for investigating ILS platform and products, gathering and using appropriate feedback from stakeholders, and for competitive bidding and other strategies for procurement.
- *Participation of member libraries in consortia:* Develop best practices for agreements between member libraries and consortia, models for decision making within the consortia, enforcement of policies and procedures, and funding formulas.
- *Budgeting:* Develop a template that systems would be **required** to use for developing and reporting the budget for ILS services.
- *Multi-consortial agreements:* Develop best practices and sample language for agreements between two or more ILS consortia that want to consolidate or provide joint services.

Accountability and clarity

- Research and/or develop metrics for measuring satisfaction with consortia-provided services related to the ILS.
- In conjunction with these metrics, develop benchmarking for quality of service.

Centralized services

- Develop a proposal for centralized training, software support, and hosting services for Innovative Interfaces Inc. products.
- Discuss possible price discounts with Innovative Interfaces Inc.
- Investigate centralization of bibliographic services.

Next Steps:

A second phase likely will continue into 2015 to analyze the results and propose changes to the current structure for savings or efficiencies and to avoid duplication of resources and efforts. Some of those activities will depend on available funds and resources, as well as activities by the DPI resulting from recommendations from COLAND's Strategic Vision for Library Systems in the 21st Century and the recent DPI efficiency study of library system services (see item 1. in Channel Weekly, Vol. 17, No. 3 -- September 18, 2014, http://channel.dpi.wi.gov/chn_chwk1703).

Questions about the ILS study can be directed to [Ryan Claringbole](#).